

CONSUMER MARKETING REPORT

Presented to the
Montana Tourism Advisory Council

Katy Peterson
Montana Office of Tourism
October 3, 2012

AGENDA

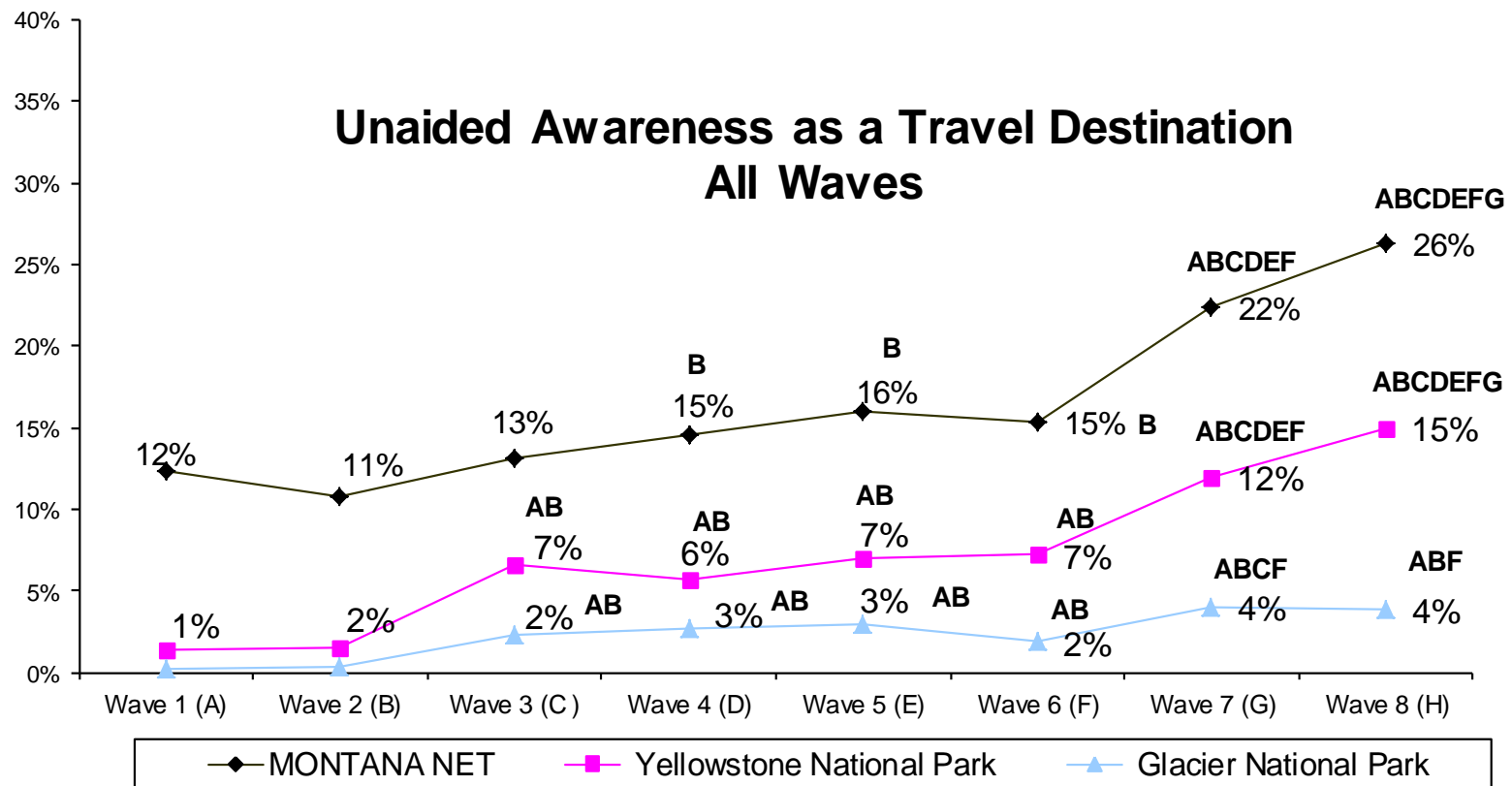
- + BRAND AWARENESS STUDY RESULTS (2012)
- + OVERVIEW OF 2012-13 WINTER CAMPAIGN
 - NATIONAL
 - KEY MARKET
 - EVENT SPONSORSHIP

RESULTS: BRAND AWARENESS STUDY

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DRAMATIC INCREASE IN BRAND AWARENESS



MADE A SPLASH IN SLC

+ 35% aware, an increase of 52% over the course of one campaign

Unaided Awareness as a Travel Destination

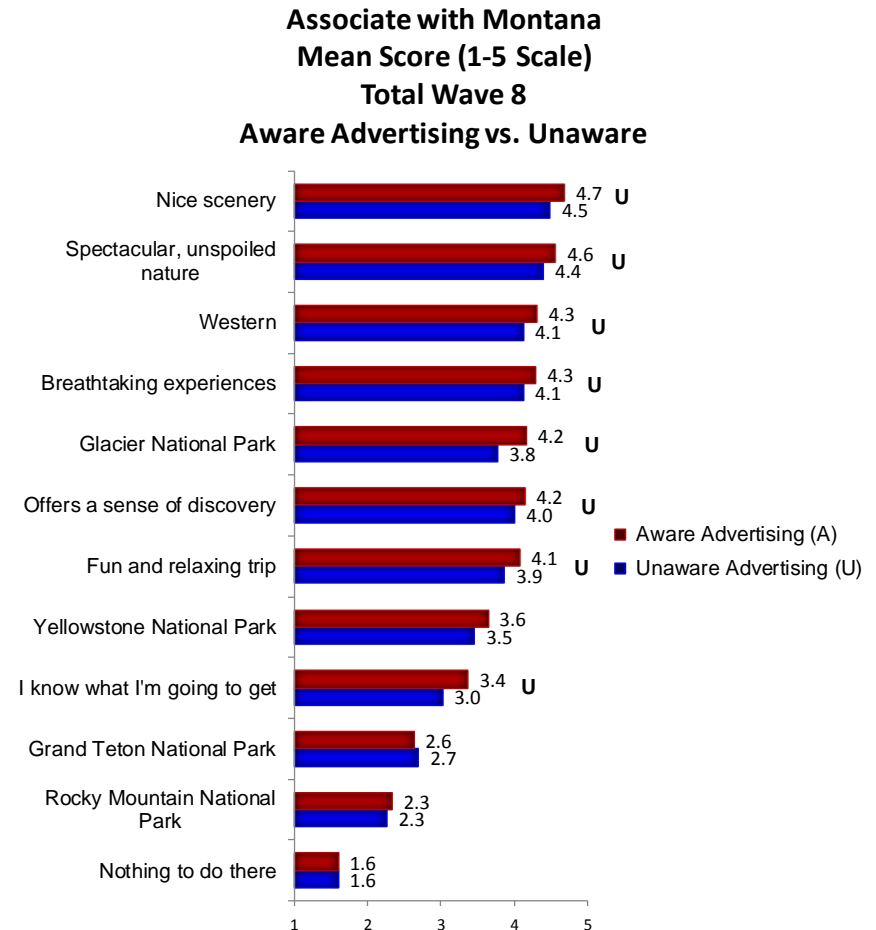
	SLC W1	SLC W2	SLC W3	SLC W4	SLC W5	SLC W6	SLC W7	SLC W8
Main Competitive Set	NA	NA	NA	NA	NA	NA	(G)	(H)
MONTANA NET	-	-	-	-	-	-	23%	35% G
Yellowstone National Park	-	-	-	-	-	-	16%	25% G
COLORADO NET	-	-	-	-	-	-	21%	24%
Oregon	-	-	-	-	-	-	26%	21%
WYOMING NET	-	-	-	-	-	-	15%	16%
Grand Teton National Park	-	-	-	-	-	-	1%	3%
Utah	-	-	-	-	-	-	2%	2%
Glacier National Park	-	-	-	-	-	-	3%	2%
Rocky Mountain National Park	-	-	-	-	-	-	1%	2%

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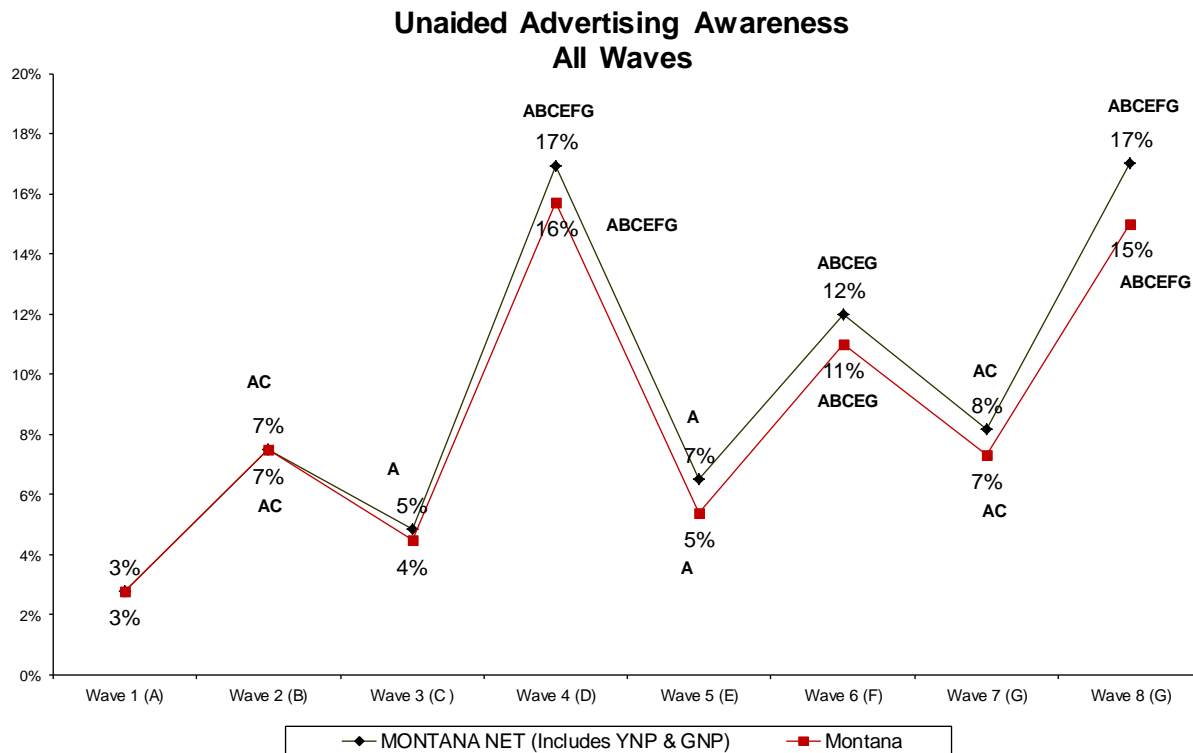
CREATIVE MESSAGE IS WORKING

+ Those aware of Montana's advertising are significantly more likely to associate key attributes/brand pillars ("brand associations") with the state



ADVERTISING AWARENESS INCREASES

+ 15% in 2012, a 25% increase over 2011 and a 4-fold increase since 2009



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TRAVEL INTENT UP

- + Likelihood to travel at all-time high of 31%
- + Up 24% over 2011; up 82% in since 2009

Likelihood to Travel								
All Aided Destinations Top Box (4 or 5 Score)	Total W1	Total W2	Total W3	Total W4	Total W5	Total W6	Total W7	Total W8
	(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)
California	47%	52%	59%	61%	58%	61%	65%	64%
Colorado	32%	31%	42%	39%	41%	40%	44%	48%
Washington	23%	23%	49%	50%	49%	48%	46%	48%
Oregon	20%	18%	42%	45%	44%	45%	45%	46%
Utah	21%	17%	25%	22%	25%	27%	42%	43%
Yellowstone National Park	25%	21%	27% B	26% B	26% B	27% B	35% ABCDEF	36% ABCDEF
Michigan	29%	27%	38%	34%	37%	36%	33%	33%
Alaska	20%	22%	27%	27%	23%	25%	29%	32%
Montana	17% B	13%	24% AB	23% AB	23% AB	25% AB	31% ABCDEF	31% ABCDEF
Wyoming	16%	13%	23%	20%	20%	19%	30%	31%
Idaho	11%	8%	23%	24%	24%	23%	31%	30%
Rocky Mountain National Park	17%	16%	26%	22%	23%	24%	27%	27%
Grand Teton National Park	15%	13%	18%	17%	17%	18%	26%	26%
Glacier National Park	15%	13%	23% AB	19% B	20% AB	21% AB	24% ABDE	25% ABDE
Maine	20%	18%	21%	20%	25%	23%	24%	24%
Vermont	18%	14%	19%	17%	20%	20%	22%	19%

YEAR-ROUND CAMPAIGNS CRACK MARKETS

+ Finally retaining the effects of campaign in Chicago

Unaided Advertising Awareness								
Main Competitive Set	Chicago W1 (A)	Chicago W2 (B)	Chicago W3 (C)	Chicago W4 (D)	Chicago W5 (E)	Chicago W6 (F)	Chicago W7 (G)	Chicago W8 (H)
COLORADO NET	17%	7%	9%	12%	6%	5%	8%	14%
WYOMING NET	1%	12%	0%	15%	2%	11%	1%	13%
MONTANA NET	1%	5% AC	1%	17% ABCEG	2%	10% ABCE	6% ACE	12% ABCEG
Montana	1%	5% ACE	1%	16% ABCEG	1%	10% ABCE	6% ACE	11% ABCE
Utah	8%	3%	5%	3%	3%	1%	1%	2%
Oregon	2%	0%	0%	0%	1%	1%	-	1%
Yellowstone National Park	0%	0%	0%	1%	1%	0%	-	1%
Glacier National Park	0%	0%	0%	0%	1%	0%	0%	0%

+ Ad awareness increases translate to travel intent increases over time: National up 50% in 4yrs; Chicago up 50% in 4 yrs; Minneapolis up 44% in 3 yrs

BRINGING DOWN OBSTACLES TO PURCHASE

- + “Not familiar” dropped from high of **16% to 3%**;
- + “Nothing interests me there” dropped from **21% to 9%**;
- + “Too far away” dropped from **19% to 13%**

Why NOT Inclined to Travel to Montana								
Total Geotravelers Not Likely or Definitely Will Not Travel to Montana	Total W1	Total W2	Total W3	Total W4	Total W5	Total W6	Total W7	Total W8
	(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)
Other places wish to see more	27%	30%	39% AB	41% AB	36% A	42% AB	40% AB	47% ABE
Been to MT recently/already	8%	5%	11% B	10% B	11% B	11% B	10% B	12% AB
No time	5%	8%	4%	9% C	10% AC	9% AC	9% AC	11% AC
Too far away	17% CD	19% CDEFGH	11%	10%	12%	13%	13%	13%
Can't afford/Budget/Economy	16% CH	14% H	10%	13%	14% H	14% H	13% H	9%
Nothing interests us/me there	21% EFGH	18% EGH	21% EFGH	17% GH	13%	13%	10%	9%
No friends/family there	-	0%	5% B	8% B	7% B	7% B	5% B	7% B
Not appealing for small children	3%	3%	3%	7% B	4%	5%	4%	4%
Not familiar with Montana	13% CDEFGH	16% CDEFGH	8% DFGH	2%	4%	4%	4%	3%
Not driveable/traveling only by driving	4% CDEF	3% E	2%	1%	1%	1%	4% DE	3%
Difficult to travel to	3%	6% DEFH	5%	2%	2%	2%	3%	2%
No travel planned	1%	2%	1%	-	1%	2%	0%	1%
Not enough vacation for an extended trip	-	5% CEFG	2%	-	2%	2%	1%	-

2012-13 WINTER CAMPAIGN

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CAMPAIGN OVERVIEW

+ MARKETS

- National
- Key Markets: Chicago, Minneapolis, Seattle, Portland

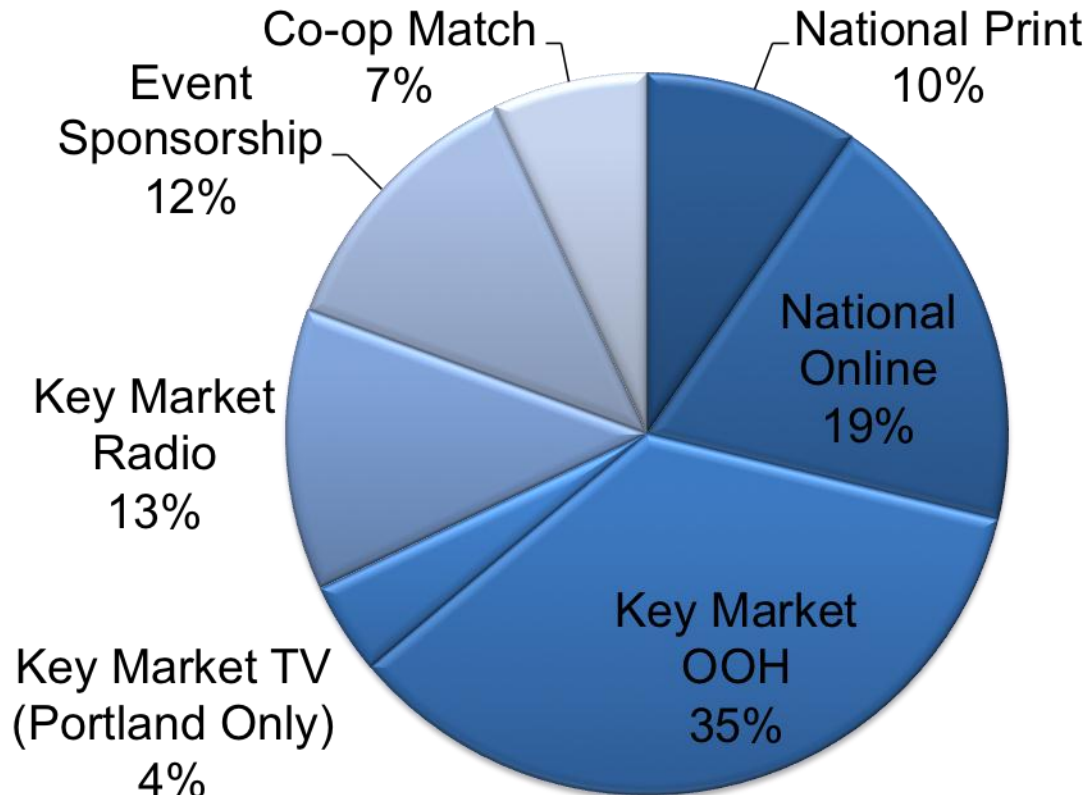
+ MEDIA

- National: Print, Online, Event Sponsorship
- Key Market: Out-of-Home, Radio, TV (Portland only)

+ TIMING: October 15, 2012 – January 31, 2013

+ MEDIA BUDGET: \$2,405,000

WINTER MEDIA BUDGET



PRINT

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WINTER PRINT: PARTNERS

- + Outside
- + National Geographic Traveler
- + Ski
- + Backpacker
- + Travel & Leisure
- + Food & Wine
- + History

I JUST LOVE TO MAKE TURNS

and that freedom I enjoy on a pair of skis is without comparison in any other sport. You can look out on a bluebird day; the sky is cobalt and the powder snow is as deep as you want. I could live anywhere in the world, and I choose to live here in Montana, all winter long. —Warren Miller

MONTANA WINTERMT.COM

Moonlight Basin, Big Sky, Montana

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Moonlight Basin, Big Sky, Montana

SKI MONTANA

It's deeper in Montana. The snow, sure—three storms in the past two weeks and nobody's shown up to turn it into moguls yet. But the experience, too—in the backcountry of Glacier or among the wildlife in Yellowstone, alone with the snow ghosts in Whitefish, or on a wooden two-seater at a mom-and-pop hill, there's a different feeling here. The air is a little fresher, nature is a little closer and time moves a little slower.

15 UNDISCOVERED SKI AREAS

MILLIONS OF ACRES OF UNTRACKED POWDER

GLACIER & YELLOWSTONE NATIONAL PARKS



DAY AREAS WITH LIFT TICKETS UNDER \$37

1. Bear Paw Ski Bowl An all-volunteer group of locals manage and operate this trip back in time known as "The Last Best Ski Hill."

2. Blacktail Mountain Ski Area All north-facing slopes mean the snow stays soft even on bluebird days at this park-at-the-top, family-friendly hill.

3. Great Divide Aggressive snowmaking means early- and late-season runs on the six terrain parks at "Montana's sunniest ski area."

4. Lost Trail Powder Mountain Closed Monday - Wednesday and situated right atop the Continental Divide, Powder Thursdays are epic more often than not in the Bitterroots.

5. Maverick Mountain Ski 2,000' of vert with great views for just \$30 at this classic mom-and-pop hill in southwest Montana.

6. Turner Mountain Ski Magazine is in love with this weekend-only area that "might offer the best lift-assisted powder skiing in the U.S."

HIDDEN GEMS FOR A WEEKEND GETAWAY

7. Discovery Ski Area An expert's mountain wrapped in a locals' hangout, home to some of the steepest north-facing lift-served terrain anywhere.

8. Lookout Pass Ski and Rec Area Free ski school for kids ages 6 - 17 means 400" of average annual snowfall is waiting for all the laps you care to throw at it.

9. Montana Snowbowl \$42 lift tickets will get you 2,600' of vert at this extremist's dream right in Missoula's backyard.

10. Showdown Montana Backcountry snowmobiling in the Little Belt mountains is almost as much fun as shredding Montana's oldest ski area.

"An expert's mountain wrapped in a locals' hangout"

DESTINATION RESORTS

11. Big Sky Resort If you haven't ridden the tram to the top of Lone Peak, you have no idea. 4,350' of vert, 400" of snowfall, and a full-service resort experience.

12. Bridger Bowl Heard of Cold Smoke powder? It was invented here. Steeps, chutes, and extremely dry snow make this non-profit ski area one of the west's hidden gems.

13. Moonlight Basin A combined ticket with Big Sky gets you 5,500 acres. Moonlight stands out for its huge terrain park and Montana hospitality.

14. Red Lodge Mountain Resort One of Montana's best small towns is home to Montana's best late-season snow, as well as a passion for skiing over glitz and glamour.

15. Whitefish Mountain Resort Ski 360" from the peak of Big Mountain and find great conditions with a laid-back, small-mountain feel.

SKIMT.COM

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SHAPED BY WINTER



Whitefish Mountain Resort

AN INTERVIEW WITH WARREN MILLER SKI FILMMAKER & STORYTELLER

Ski movie pioneer Warren Miller has carved turns from the Himalayas to the Rockies, from the Alps to Antarctica. His movies about those trips make you laugh out loud and yearn for more; they make you want to etch some tracks of your own. Recently, in his slopeside home near Big Sky, Montana and Yellowstone National Park, he sat down with veteran Montana journalist Scott McMillion to discuss mountains and the freedom they can give you.

Scott McMillion: People all over the world rave about your movies. What makes them so popular?

Warren Miller: When I started filming in 1947, there were only 15 chairlifts in the world. And I liked to tell stories about how wonderful those places are, so I would give a little history while guys were coming down the hill. Or I'd say something funny to cover up some bad photography. The movies got more sophisticated over time, but they're still basically stories about that simple word called freedom. That's what I'm always preaching.

SM: How does skiing equal freedom?

WM: When you get to the bottom of the hill after a good run, you're a different person. You've been psychoanalyzed. It's like somebody drilled a hole in your brain, inserted all this wonderful scenery, people, snow and freedom. And it forces out the bad stuff.

SM: Hard to argue with that. But why did you settle in Montana? The world has a lot of great skiing.

WM: In Montana, you can still find skiing the way it used to be. We've got fine resorts, but some of the motels at the smaller hills still advertise "color TV." And the best meal might be out at the only restaurant. In other states, resorts attract 25,000 people a weekend. I don't think there are 25,000 skiers in all of Montana. A good run plants a good memory and in Montana, you can still make a lot of memories in one day.

SM: So this is your winter home.

WM: I'm 87 years old. For 55 years of my life, I traveled the world with my skis and camera and made movies of all that stuff. But when I came to Montana, I built a house.



Warren Miller, 1952



See the magic of Yellowstone in its secret season: winter.

SM: Has skiing changed much during your career?

WM: When I started, anybody who could make six turns without falling was an extreme skier. The lifts ended where the mountain got really steep, because people couldn't handle that stuff.

SM: What's your take on snowboards?

WM: I put snowboards in my films seven years before they were allowed on chair lifts. I don't care what people have on their feet as long as they don't run into me and they have a smile on their face.

SM: What hasn't changed?

WM: People still do what it takes to go skiing. I don't like the term ski bum because a bum doesn't work. But at a ski resort, they're diving cabs, cooking pizza, shoveling snow, so that on a day like today, with six inches of fresh snow, they're the first guy or girl on the lift in the morning. That's the golden spoon they eat from.

SM: You make it sound pretty good. Fresh powder and golden spoons.

WM: I'm a big proponent of people taking a year off when they finish college. Cook some pizzas and go skiing. Who knows what could happen?

SM: Are you still making movies?

WM: I sold the film company. Now I'm focusing on my autobiography. I've been a storyteller almost since day one, and I'll be a storyteller until I die. And Montana is a good place to write.

SM: Here in the middle of a ski resort?

WM: This is a special place in a world with a lot of blemishes. In a city, you've got to breathe the smog, stop for the traffic, pay as much as \$15 an hour to park your car. When the snow covers everything, you don't see those blemishes. And at Montana ski areas, the parking is most likely free, though sometimes the lot might not be plowed right away.

SM: Is that a problem?

WM: Not really. In Montana, everybody keeps a shovel in their car.

View more about Warren and skiing in Montana at SKIMT.COM

ONLINE

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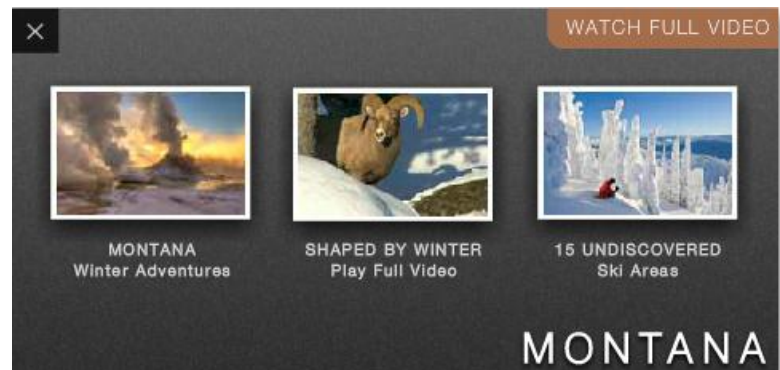
WINTER ONLINE: PARTNERS

- + Ski & Skiing
- + Discovery
- + Food Network
- + iExplore
- + National Geographic
- + Scripps
- + Sojern
- + Travel Channel
- + TripAdvisor
- + Brightroll
- + Yahoo
- + Search

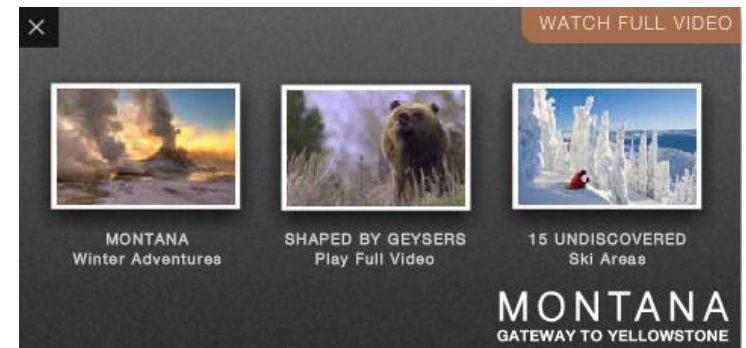
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SNOW REPORTS: Breckenridge **CLOSED** H 75° L 48° / 24 hour snow* / 48 hours snow 0° / Lifts Open 0 of 30 / Base Lower/Upper 29/55



Beartooth Bangers

The best shots from the Beartooth Summer Session

FRESH

DAILY NEWS, STORIES, EVENTS,
BLOG POSTS, VIDEOS AND PHOTOS



09.10.12

Chris Davenport Signs With Scarpa

Chris Davenport to help mastermind a new boot line.

related tags: Backcountry Gear, Gear, Scarpa, AT, Boots

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SKI AREAS

MILLIONS OF ACRES
UNTRACKED
POWDER

GLACIER AND
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29,771 people like Skiing Magazine.



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It's deeper in Montana. The snow, sure—three storms in the past two weeks and nobody's shown up to turn it into moguls yet. But the experience, too—in the backcountry of Glacier or among the wildlife in Yellowstone, alone with the snow ghosts in Whitefish, or on a wooden two-seater at a mom-and-pop ski hill, there's a different feeling here. The air is a little fresher, nature is a little closer and time moves a little slower.

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GLACIER AND YELLOWSTONE NATIONAL PARKS



2012-13 WINTER SEASON CAMPAIGNS

KEY MARKET CAMPAIGNS

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KEY MARKET CAMPAIGNS

+ Markets

- Chicago
- Seattle
- Minneapolis
- Portland (NEW for FY13)

+ Timing: October – December 2012

+ Paid Media

- Out-of-Home
- Radio (:60 spots)
- TV (:30 spots)

KEY MARKET

OUT-OF-HOME

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KEY MARKET

RADIO

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WINTER RADIO

+ Featuring Warren Miller

– Ski 

– Winter Experience 

KEY MARKET

SPOT TV

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2012-13 WINTER CAMPAIGN

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THANK YOU.

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